Total Expert Onboarding Journey (High-Level) Guide

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Journey Overview

- Journey intended to help onboard new loan officers over a period of time
- Series of 16 emails – with opportunity to customize to your organization

Journeys Emails Intro to Total Expert

Intro to Total Expert

Email Name: Total Expert Onboarding - The Power of Total Expert

Hi {{recipient.f_name}}!

There is a reason Total Expert was named the **#1 CRM platform by STRATMOR Group** - the results are simply undeniable. Today, there are over 44,000 loan officers using Total Expert and experiencing results like these:

- **10% increase in lead-to-close**
- **20% boost in sales productivity**
- **2x growth in customer loyalty and retention**

By combining sales productivity tools with intelligent marketing automation, Total Expert orchestrates the perfect customer experience for your borrowers.

So, what do you say ... are you ready to unleash the power of Total Expert and start seeing real results? Be sure to stay up to date with your Total Expert onboarding journey and courses. If you have any questions, reach out to [insert contact name here]!

> **Warning**
> This email needs minor editing.

Platform Overview

Email Name: Total Expert Onboarding – Five Ways to Win

Hi {{recipient.f_name}}!

As you start to learn about the Total Expert platform, it is easy to feel overwhelmed. It is a powerful system with robust capabilities, but that shouldn't scare you - that should empower you!

To get familiar with the system, start by watching this quick, 6-minute video that demonstrates five of the top features in Total Expert: **CRM, Lead Capture Apps, Single Property Sites, Social Media, and Print Marketing**.

[<Link to Platform Video >](#)

Stay tuned as we dive deeper into each one of these categories and be sure to set aside time each week to review the associated help resources to get to know the platform better.

Daily Digest

Email Name: Total Expert Onboarding – Daily Digest

Hi {{recipient.f_name}}!

Total Expert recently [conducted a study](#), and they found that loan officers who utilized the **Daily Digest** as part of their everyday routine experienced:

- **4x increase in loan applications**
- **3.4% increase in close rate**

The Daily Digest is an email delivered directly to your inbox each day with a personalized summary of your specific activities, tasks, new contacts, key borrower milestones, and more!
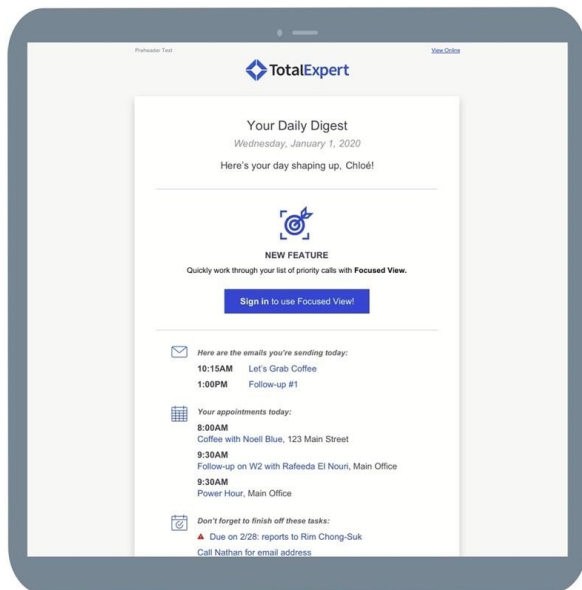
Take a minute to save a ton of time - and grow your business! Make sure you have your Daily Digest notifications turned on so you receive your daily email. Not sure how? Click below.

<[link to help resource](#)>

Contact Lists

Email Name: Total Expert Onboarding – Contact Lists

Hi {{recipient.f_name}}!

Looking for a simple way to stay connected with your clients—past, present, and future? In Total Expert, you can easily build powerful contact lists that help you scale your outreach and stay connected – without missing a beat.

In just a few clicks, you can set up targeted lists like:

- **[Client Retention List](#)**
- **[Potential Refinance Opportunities](#)**
- **[EPO Risk Mitigation](#)**

Take a few minutes today to try creating one of these lists in your Total Expert account. If you want to go deeper, check out this training course below:

<[link to Contact List course](#)> TBD

~~A recent study by Total Expert, they found that loan officers who use the Focused View feature experienced **a 10% increase in lead-to-application**.~~

~~Focused View automatically surfaces up leads and contacts into sorted lists based on priority and your business goals. This way, you can start each day with your best money-making opportunities laid out for you: See your pre-approval expirations, refi opportunities, leads just in, loan data, and more.~~
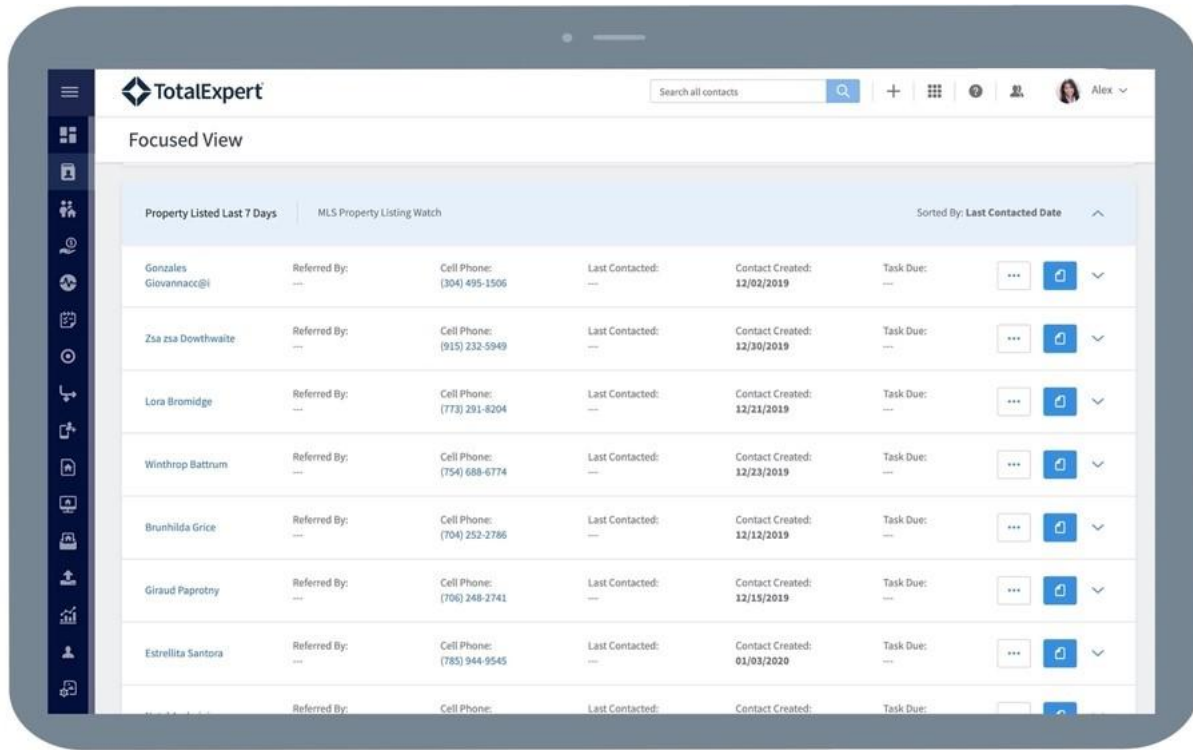
~~Start by competing the Focused View Feature Overview course below. This interactive course will help introduce you to the benefits of using Focused View, assist you in learning how to access views and understand them, and highlight the features and capabilities available to you.~~

~~<link to Focused View course>~~

Chat Support

Email Name: Total Expert Onboarding – Chat Support

Hi {{recipient.f_name}}!

Not sure how everything works in Total Expert? No problem!

Just click the support button in the lower right-hand corner of your screen when you're in the system...

...and help arrives!

Quick questions come up a lot - and you can get quick answers! Live Total Expert chat is available from 8 AM - 7 PM Monday through Friday - and you can even get help on Saturdays!

Journeys

Email Name: Total Expert Onboarding – Journeys

Hi {{recipient.f_name}}!

Are you communicating regularly - and automatically - with all of your leads, partners, contacts and past clients? Here's how you can check:

- Log into Total Expert
- Click "Journeys" in the menu bar on the left
- Choose "Active Journeys"

This will allow you to see if you have any Journeys turned on - and how many. Don't miss an opportunity to reap the reward of consistent, relevant, effortless communication!

Link to Journey Overview Course

Activity Stream

Email Name: Total Expert Onboarding – Activity Stream

Hi {{recipient.f_name}}!

Do you know how to check who's interacting with your marketing materials? Who's receiving, opening, clicking, and unsubscribing to your emails? It's easy to find out!

Head to your Activity Stream on the left menu in Total Expert. There you will be able to filter by date range and category to easily track your contacts' interactions and activity.
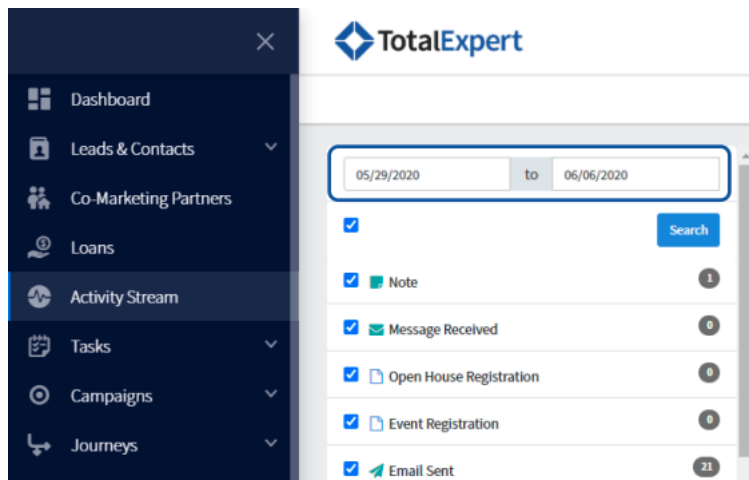
Click below to try our interactive step-by-step walkthrough of the Activity Stream.

<link to Activity Stream Overview>

BombBomb

Email Name: Total Expert Onboarding – BombBomb

Hi {{recipient.f_name}}!

A quick video message is a great way to make "one to many" outreach that still feels personal. And you can send them quickly and easily using the BombBomb integration in Total Expert.

Once your BombBomb integration is set up, your BombBomb videos will populate in Total Expert, and you can start sending personalized video messages to contacts or a specific group of contacts.
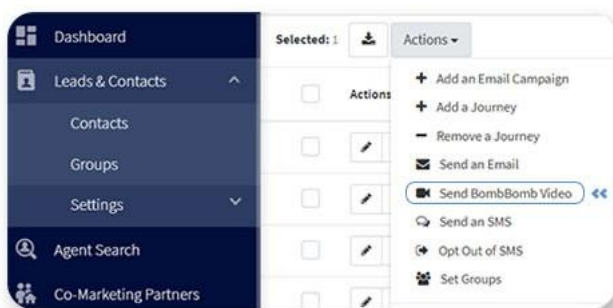
Complete this step-by-step simulation to learn how to set up your BombBomb integration in Total Expert.

<link to BombBomb simulation>

Knowledge Base

Email Name: Total Expert Onboarding – Knowledge Base

Hi {{recipient.f_name}}!

You have all the knowledge about Total Expert right at your fingertips!
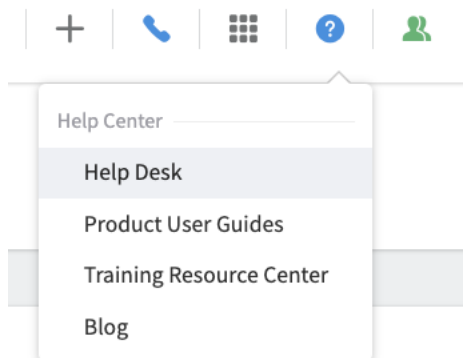
The Knowledge Base is your one-stop-shop to get all your Total Expert questions answered. You can access the Knowledge Base by either clicking the **blue chat widget** at the bottom right-hand corner of the platform or by clicking the **Help Desk** at the top right-hand corner of the platform.

From there, you can ask questions, browse articles, watch videos, and find answers - easily and efficiently.

Co-Marketing Partners

Email Name: Total Expert Onboarding – Co-Marketing Partners

Hi {{recipient.f_name}}!

Co-Marketing is a huge benefit for you and the real estate agents and builders you want to partner with. In fact, Total Expert found that the loan officers who utilize Co-Marketing Partners (CMP) see:

- **2.4 more applications**
- **2.1 more closed loans**

Through Total Expert's MLS integration, you can easily collaborate with your Co-Marketing Partners on Single Property Websites, Lead Capture Apps, and Print Marketing, as well as share leads and manage your contacts.

Start by completing the Co-Marketing Partner Course below. This interactive course will help you understand the benefits of having Co-Marketing Partners, the capabilities available to you as a CMP, and how to manage your relationships.

<[link to start CMP course](#)>

Co-Branded Marketing

Email Name: Total Expert Onboarding – Co-branded Marketing

Hi {{recipient.f_name}}!

The only thing better than a great-looking listing flyer is one that also has your name and contact info on it.

In Total Expert, you can create **co-branded marketing materials** with any connected Co-Marketing Partner.

Easily create co-branded Print Marketing, Single Property Sites, Lead Capture Apps and more!

Not only will you help your agent build their business, but you will also be boosting your brand exposure.

<link to creating co-branded print >

Single Property Websites

Email Name: Total Expert Onboarding – Single Property Site

Hi {{recipient.f_name}}!

Did you know that property listings are the most digested content on social media? According to the National Association of Realtors (NAR), 95% of homebuyers search websites to find homes. In fact, online browsing was the first step 44% of buyers took in the home search, while only 17% contacted a real estate agent before doing anything else.

You can help your agent partners get their listings out online and on social media with **Single Property Websites** (SPS) in Total Expert. Your agents' listings will be promoted on multiple channels - while also promoting your brand.
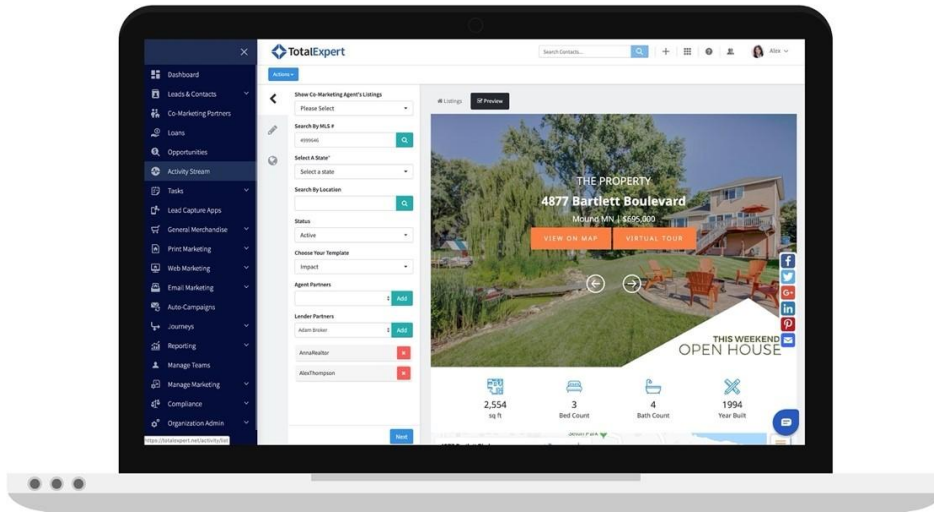
Click below to learn how to create a Single Property Website.

<link to SPS quick hit video>

Lead Capture App

Email Name: Total Expert Onboarding – Lead Capture App

Hi {{recipient.f_name}}!

When it comes to getting leads, there's no time like the present! Whether you're at an open house, holding a home buyers' workshop, or piquing the interest of a homeowner on social media, **Lead Capture Apps** (LCA) are an easy, modern way to move interested parties into your database...and hopefully your pipeline!

First, locate **Lead Capture Apps** from your dashboard menu. Then click "Create" in the drop-down menu next to "Layout." You'll have your choice of several formats for different lead types.
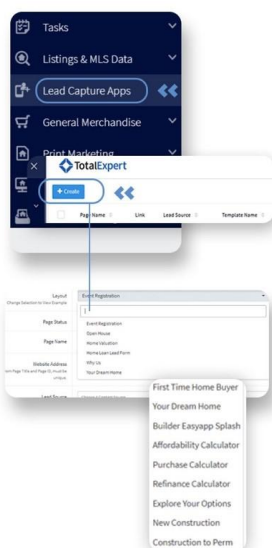
Select your template, fill in the necessary fields, and press submit! In a matter of minutes, you will have a beautifully branded lead capture form to share on social media or with your Co-Marketing Partner!

Click below for an interactive step-by-step guide on how to create a Lead Capture App.

<Lead Capture App Feature Overview>

Infographic

Email Name: Total Expert Onboarding – Infographic

Hi {{recipient.f_name}}!

You can help elevate your agents to community experts with **Property Detail Infographics** available in Total Expert.

These flyers help your agents highlight buyer "must-haves" from in-home amenities to local landmarks and show neighborhood, school, and attraction information for every MLS listing.

Infographics are easy to generate; each flyer automatically populates with MLS data, and you can customize them for maximum impact.

You can become an invaluable resource for your agents to promote their listings and properties they're showing. Watch this short video to learn how to create a Property Detail Infographic on your own.

<Video on infographics>

Rate Flyer

Email Name: Total Expert Onboarding – Rate Flyer

Hi {{recipient.f_name}}!

Let's get real. How many times do you get asked by your agents to create a rate flyer for them? Answer is probably ... a lot.

With just a few clicks, you can create a beautiful, compliant custom rate flyer that showcases both the property and the potential loan programs.

So next time your agent asks, head straight to Total Expert where you can easily and quickly create a custom rate flyer for your partner.

<[link to video on rate flyers](#)>

Mobile App / Engage SMS

Email Name: Total Expert Onboarding - Getting Started with the Mobile App

Hi {{recipient.f_name}}!

Let's face it - your day doesn't always happen behind a desk. That's why there is the **Total Expert Mobile App**, designed to help you engage, manage, and grow your business on the go.

Getting started is easy—just follow these three simple steps:

Step 1: Download the mobile app to your phone

- **iOS:** [Download from the App Store](#)

- **Android:** [Download from Google Play](#)

Step 2: Turn on auto-updates in your settings

- **On iOS:** Go to Settings > App Store > App Updates and toggle App Updates on.

- **On Android:** Open the Google Play Store > Profile Icon > Settings > Network Preferences > Auto-update apps and choose your preference.

Step 3: Learn how to use the Mobile App and SMS

- [Take the Mobile App and SMS training](#)

Multi-Channel Support

Email Name: Total Expert Onboarding – Multi-Channel Support

Congrats {{recipient.f_name}}, your Total Expert onboarding is officially complete! 🏆

As you start to use Total Expert more and more each day, don't forget that there are multiple different support resources available to help you:

The Help Desk

- Access Total Expert's online knowledge base to learn more about using features in Total Expert.
- Includes help videos, best practices, feature overviews, and more!
- Click on the Help Desk in the top right-hand corner of the platform!

Live Chat

- Connect with the Total Expert Product Support Team via live chat from 8 a.m. - 7 p.m. CT, Monday - Friday.
- Live chat available on Saturdays from 9 a.m. to 5 p.m. CT.
- Click on the blue chat widget at the bottom right-hand corner of the platform!

If your questions are specific to [company name], please reach out to [marketing contact email address].

> **Warning**
> This email needs minor editing.

Best Practices

- Review all the onboarding emails and make sure they work for your organization. Omit or replace emails that do not apply
- Change timer delays to fit your time frame / desired cadence on onboarding
- Add a welcome email at the beginning of journey
- Add in additional details / resources to the emails that are peronal to your organization
- If turning on right after go-live, send intro email and five ways to win before launch
- Customize content to your organization including screenshots, wording, email headers
- Add in information that is specific to your organization (ie. specific Journeys, Focused Views, content, etc.
- Add in tasks + outcomes to ensure accountability with onboarding journey
- Add in additional onboarding documentation throughout the onboarding journey
- Put a "final reward" at the end of journey
  - Ie. In order to move on to x, you need to receive you're [blank] and the only way to get it is by finishing onboarding

- Include additional training resources / feature overview courses / playbooks / CTA's at the end of emails

> **Note**
> If you have additional questions or would like to chat with our Customer Engagement team, reach out to your Customer Success Manager about setting up a Customer Engagement consultation.

How to Deploy the Journey

Define how you'd like to get your end users on the journey – the "on ramp"

- End users will be considered "Contacts" in the Marketing Admin profile.
- Below are recommendations on how to deploy:
  - Option 1 – Upload your end users as contacts using the data importer and add them to a specific group. Use that group as an on-ramp to the Bootcamp Journey.
  - Option 2 – When end users go through your company's new hire orientation on Total Expert, use a lead capture app connected to the marketing admin account to gather the end user's info, saving you the time of adding them as contacts to the marketing admin account. You should have your end users automatically added to a group through the lead capture app, which you can use as an on-ramp to the Journey.
- Adding contacts as part of a new hire onboarding process is a great best practice to make sure all new hires are added to the Journey.

> **Note**
> If you do not want to use the marketing admin account, create an additional user dedicated to deploying the Bootcamp Journey and any additional internal marketing messaging you will be leveraging within Total Expert.

TOTAL EXPERT